

How To Create Permits in Edmunds



Edmunds GovTech is a utility billing software that covers many fund accounting and government based departments. Depending on the work speed network connections, you could have accounts receivable linked to taxation to budgeting and forecasting - don't know exactly what that means? No worries! Edmunds GovTech is also used for permitting and billing construction permits, which is what you are looking to do.

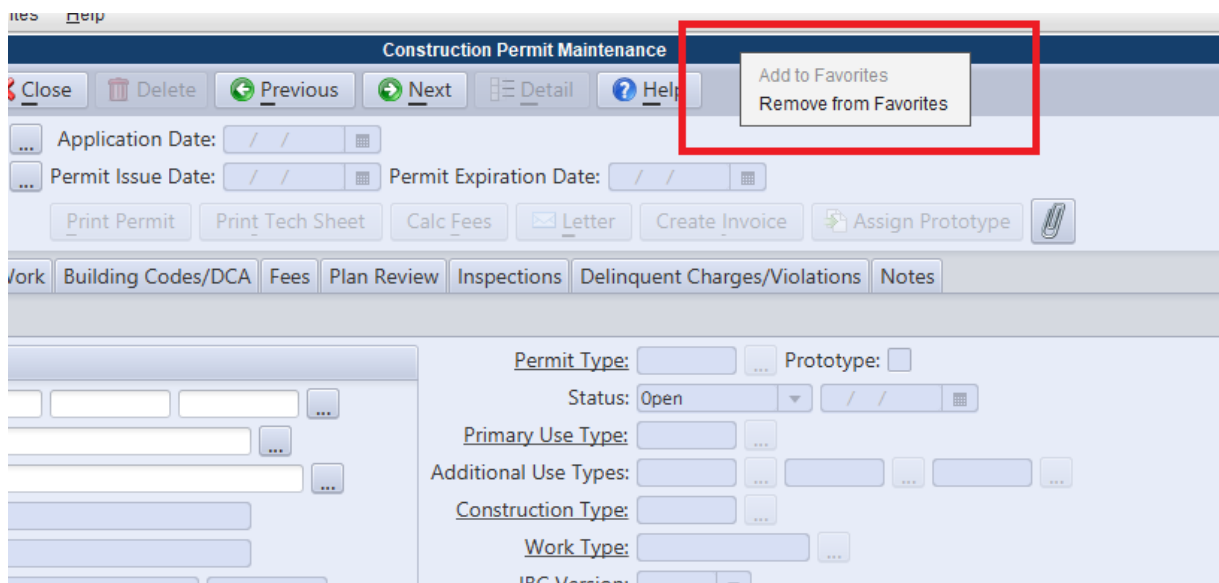
Learn the basics in permitting with three easy steps:

1. Permit Maintenance
2. Receiving Payments
3. Assigning Inspections

Assigning Favorites

The Edmunds software allows for you to not only create and bill permits, but also assign violations and enforce an inspector's inspections (and results). Like any new program, the various options may seem confusing at first, but you only need to focus on 4 options for now. Let's get the most useful options assigned to your *Favorites* tab in the top task bar:

1. Left click on *Billing/Collecting* on the top taskbar. Bring your cursor down to highlight *Construction Permits*. Left click on *Construction Permit Maintenance*. Right click on the top blue bar and select **Add to Favorites**.



2. Left click on *Billing/Collecting* on the top taskbar. Bring your cursor down to highlight *Payments*. Left click on *Payment Window*. Right click on the top blue bar and select **Add to Favorites**.
3. Left click on *Billing/Collecting* on the top taskbar. Bring your cursor down to highlight *Parcels*. Left click on *Parcel Maintenance*. Right click on the top blue bar and select **Add to Favorites**.
4. Left click on *Billing/Collection* on the top taskbar. Bring your cursor down to highlight *Misc A/R*. Drag your cursor down to *Customers* and left click on *Customer Maintenance*. Right click on the top blue bar and select **Add to Favorites**.

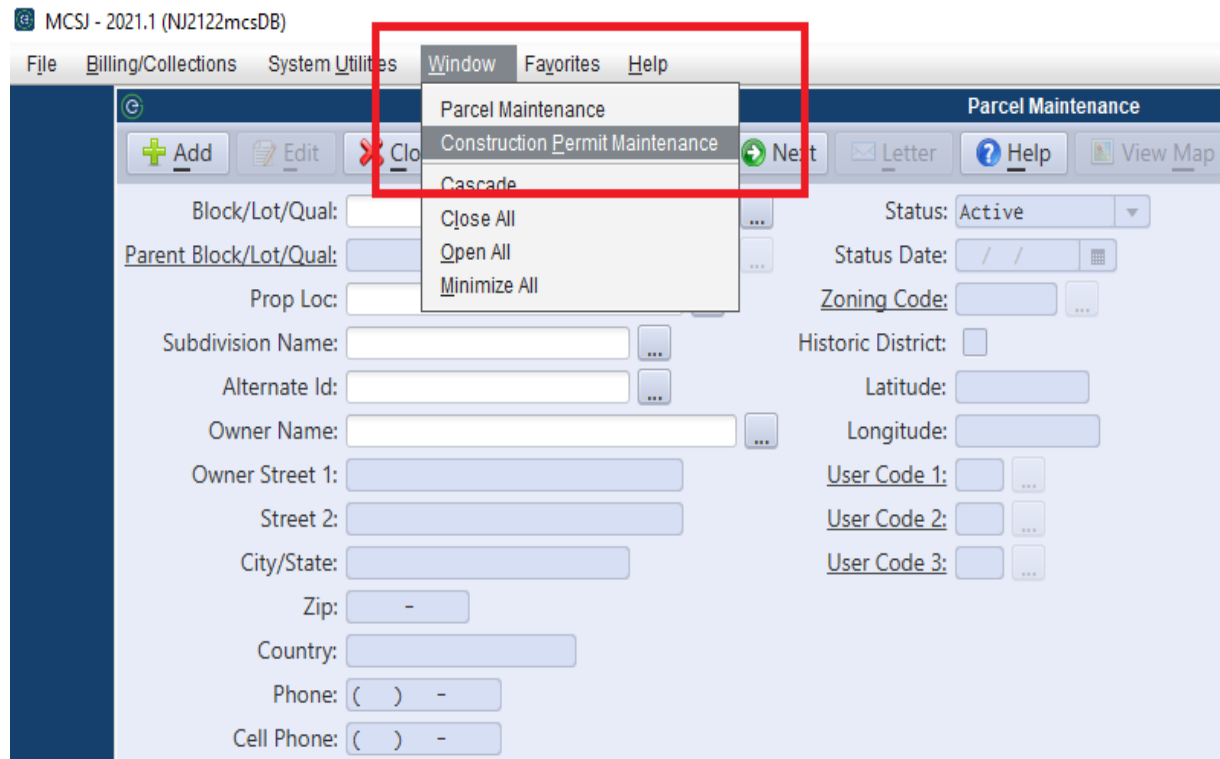
Now that you have your 4 main options set to the *Favorites* option on the top taskbar you will now easily be able to create permits.

1. Permit Maintenance

Before adding a new permit you may not have a lot and block entered into the system (ex: a newly constructed home); you will need to add this new information into the system yourself. You have this option already added in your favorites:

1. From your *Favorites* tab left click on *Parcel Maintenance*.
2. In this newly opened window click on **add**.
3. Enter the address's block/lot/qualification code(if necessary).
4. You can now enter all basic information here such as location, owner name, street, city, phone number, etc.
5. Click on **save**.

Now that you've entered this new information, locate the already opened *Construction Permit Maintenance* either by maximizing it from the bottom of the screen, or locating *Window* on the top task bar (this will display all currently opened windows):



1. On the *Construction Permit Maintenance* window click on the green + **add** button. Enter the newly added block and lot. Press the **tab** button on your keyboard to automatically generate all information added from the **Parcel Maintenance** option.

File Actions System Utilities Window Favorites Help

Construction Permit Maintenance

+ Add Edit Close Delete Previous Next Detail Help

Application Id: Permit No: Application Date: Permit Issue Date: Permit Expiration Date:

Update No: Print Permit Print Tech Sheet Calc Fees Letter Create Invoice

General Description of Work Building Codes/DCA Fees Plan Review Inspections Delinquent Charges/Violations

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2. On this first tab most information should already be filled in. You will need to enter the **customer/contractor** name. **Permit type** is the type of work being done (new building, addition, demo, etc.). **Primary use type** represents what the structure/building is coded as (B for Business, E for Educational, R-5 for Residential 1-2 Family Dwelling, etc.).
3. Clicking on the next tab brings you to the **Description of Work** where you can simply type in all information included with the customer's permit application. For example: the building subcode technical section has a description of "Replace wall in Kitchen. Add Cabinets and counter" and the electrical subcode technical section has a description of "Add 3 receptacles and 2 switches" - all you need to do is type this information in this tab.

Update No: Print Permit Print Tech Sheet Calc Fees Letter Create Invoice Dupl

General Description of Work Building Codes/DCA Fees Plan Review Inspections Delinquent Charges/Violations No

Description of Work: Conditions:

Remove wall.
Add 3 receptacles.
Add 1 sink.

4. **Building Codes/DCA** is where you each subcode and DCA information:

- Left click on **add**.
- In the blank box press the **F3** button on your keyboard to bring up a picklist of sub-codes.
- Highlight the one(s) needed and select **ok**.
- Type in the **building code** and **alteration costs**.
- **New Construction Volume** is only required for a new building

5. In **Fees** you will be able to copy all fee information from each of the technical sections.

You can add each individual type of fee by clicking **add** and then pressing the **F3** button in the **building code** box and then finding the type of work in this picklist, but a much easier way is recommended:

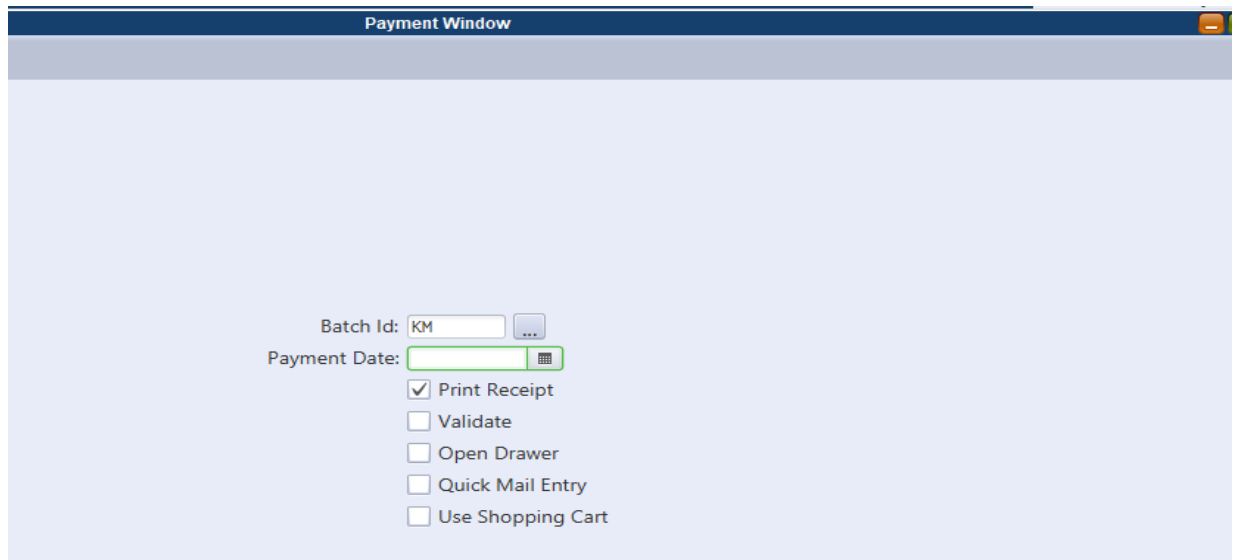
- Left click the **Calc Fees** tab above the **Fees** tab.
- A window with each added subcode and all types of work will pop up.
- Simply check each corresponding type of work and add unit number or size is applicable.
- Select **ok** when finished.

Status	Building Code	Service Id	Description	Unit	Msre
ING: 09/09/21	DCA	DCA MIN	DCA Minimum	1.0000	

6. Select **Save** at the top of the window to save all entered information to the Edmunds system. Left click on **Create Invoice** to not only create an invoice but to also generate a permit number.

2. Receiving Payments

Now that you have your permits entered into Edmunds with an invoice sent to your customers, the next step would be to collect a payment from the customer and have that entered into the system.



The screenshot shows a software window titled "Payment Window". Inside the window, there is a form with the following fields and options:

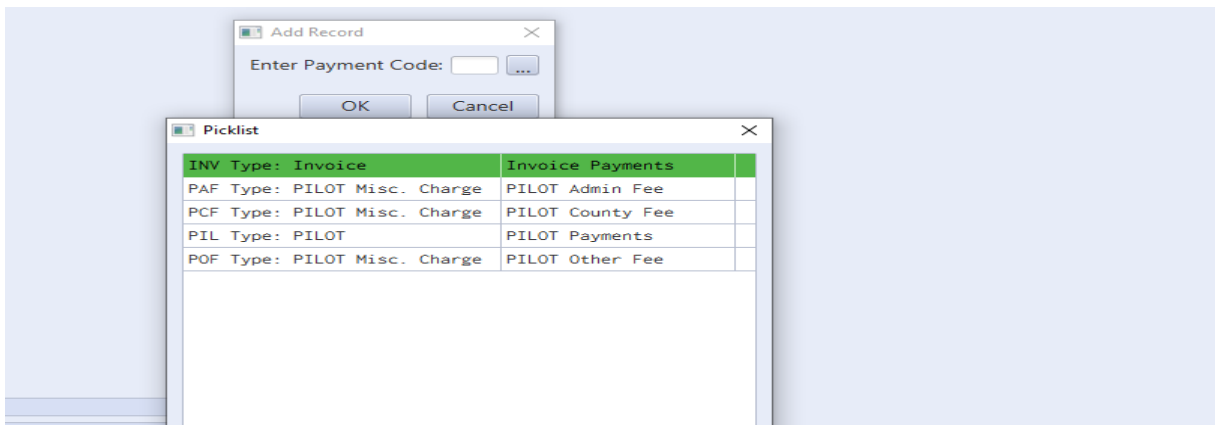
- Batch Id: A text box containing "KM" and a small button with three dots.
- Payment Date: A text box with a calendar icon to its right.
- A list of checkboxes:
 - ☒ Print Receipt
 - ☐ Validate
 - ☐ Open Drawer
 - ☐ Quick Mail Entry
 - ☐ Use Shopping Cart

Entering a Payment

Locate *Billing/Collections* at the top of the screen and left click. Drag the cursor down to *Payments* and left click on *Payment Window*.

- **Billing/Collections > Payments > Payment Window**

***Note** It would be helpful to keep the *Payment Window* saved as a favorite. Right-click on the blue taskbar and click on **Add to Favorites**.



In the *Payment Window* you will first want to enter your Batch ID and hit the Enter Key (this ID is the same used to login to Edmunds). Click **Next** to continue.

Click the **+ Add** button in order to search for an Invoice ID. You can now find an invoice with two different options:


1. Use the **Customer ID** picklist to search for the invoice by a customer's name.
2. Use the **Invoice ID** picklist to search for the invoice by the ID or by permit number (this is the best choice)

Type the amount in the **Payment Amt** option:

- Check payments can be entered in the **No:** option.
- Cash payments can be entered in the **Cash Amt:** option.
- Credit payments can be entered in the **Credit Amt:** option.

Address:

Item	Inv. Date	Service Code	Balance Due	Interest	Total Due	Split
1	06/04/20	B BPOOLA	55.00	.00	55.00	55.00
2	06/04/20	B EFIX02	.00	.00	.00	.00
3	06/04/20	B EFIX06	.00	.00	.00	.00
4	06/04/20	B EFIXTR	50.00	.00	50.00	50.00
5	06/04/20	B EPOOL	50.00	.00	50.00	50.00
6	06/04/20	DCA ALT	2.00	.00	2.00	2.00
7	06/04/20	B BMIN	15.00	.00	15.00	15.00
Total:			172.00	.00	172.00	172.00

Payment Amt:  Payment Descript: Subtotal

Check 1 Amt: No: Cash Amt: Interest Date

Check 2 Amt: No: Credit Amt:

Check 3 Amt: No: Change Due:

You can now save the payment which will save the payment information into the Edmunds system. You will need to **Update Batch**, but this will be covered in a few moments.

Printing a Receipt

After entering all the information into the **Payment Window** you can now print a customer receipt and a copy of a permit (if you need to).

After pressing the **Save** button a window should automatically pop-up prompting a print option from you. This is the receipt attempting to be printed. After printing that, another option will pop-up to print the permit with the issue date listed.

***Note** Some townships prefer to have a permit printed once the application is completed; others may prefer to have a permit printed only after a payment has been received. Either way, you can have a permit printed whenever you would like.

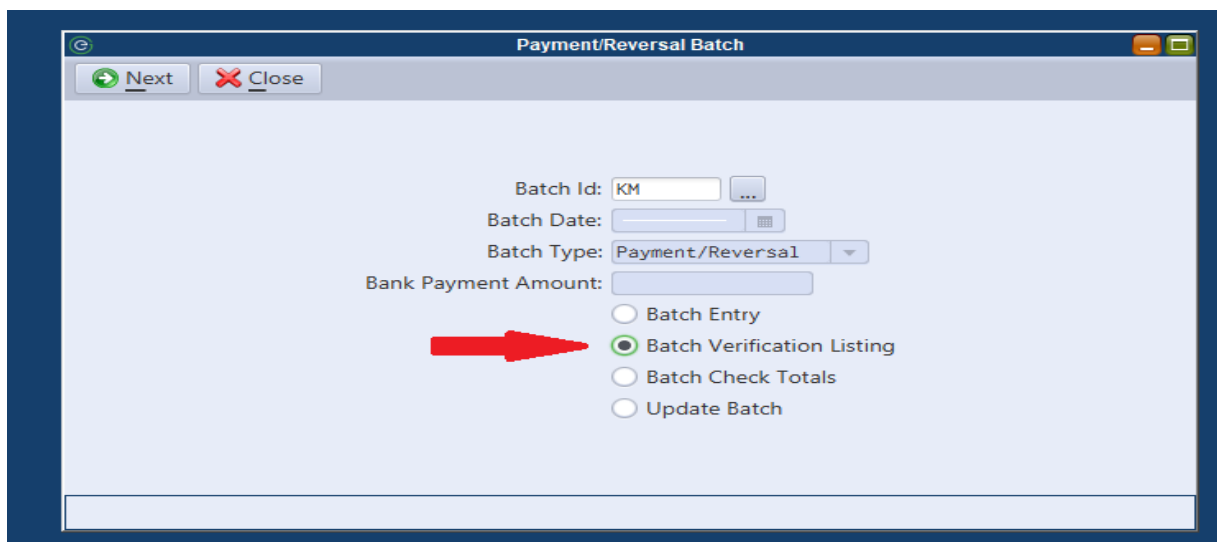
Updating the Payment Batch

Payment batch refers to the tool used to automatically update the range of payments from each batch update period to your DCA's office.

Payment Batch Window

Locate *Billing/Collections* at the top of the screen and left click. Drag the cursor down to *Payments* and left click on *Payment Batch*.

· **Billing/Collections > Payments > Payment Batch**



The screenshot shows a software window titled "Payment/Reversal Batch". At the top left are "Next" and "Close" buttons. The main area contains the following fields and options:

- Batch Id: KM
- Batch Date: [empty field]
- Batch Type: Payment/Reversal (dropdown menu)
- Bank Payment Amount: [empty field]
- Radio button options:
 - ☐ Batch Entry
 - ☒ Batch Verification Listing (indicated by a red arrow)
 - ☐ Batch Check Totals
 - ☐ Update Batch

1. Enter your ID and press enter.
2. Check **Batch Verification Listing** and press **Next**.
3. You can choose **Printer** if you want a physical copy of invoices or choose **Screen** to verify all recent invoices without printing a copy.
4. Check **Update Batch** and press **Next**.

Press **OK** to update the batch.

3. Assigning Inspections

Other than creating a permit, Edmunds other primary function is adding inspections. Not only can you manually add each inspector, but you can also set their inspection time and results. In order to maintain inspections, you will need to first add an inspector.

Inspection Schedule				
<input type="button" value="Next"/> <input type="button" value="Help"/>				
<input type="text"/> to <input type="text"/>				
<input type="checkbox"/> Rental <input checked="" type="checkbox"/> Misc				
June 2020				
Monday	Tuesday	Wednesday	Thursday	Friday
1 DG - 1 Appt(s) JF - 6 Appt(s)	2	3 DG - 1 Appt(s) JR - 3 Appt(s)	4 JR - 5 Appt(s)	5
8 JF - 4 Appt(s) JR - 3 Appt(s)	9 CD - 2 Appt(s)	10 PL - 2 Appt(s)	11 CD - 1 Appt(s) JR - 4 Appt(s)	12
15 JR - 1 Appt(s)	16	17 JF - 2 Appt(s) JR - 3 Appt(s)	18 JR - 4 Appt(s)	19
22 DG - 1 Appt(s) JR - 2 Appt(s)	23 CD - 2 Appt(s)	24 DG - 5 Appt(s) JR - 3 Appt(s)	25 CD - 2 Appt(s) JR - 4 Appt(s)	26
29 DG - 3 Appt(s) JR - 5 Appt(s)	30 CD - 3 Appt(s)	1	2	3

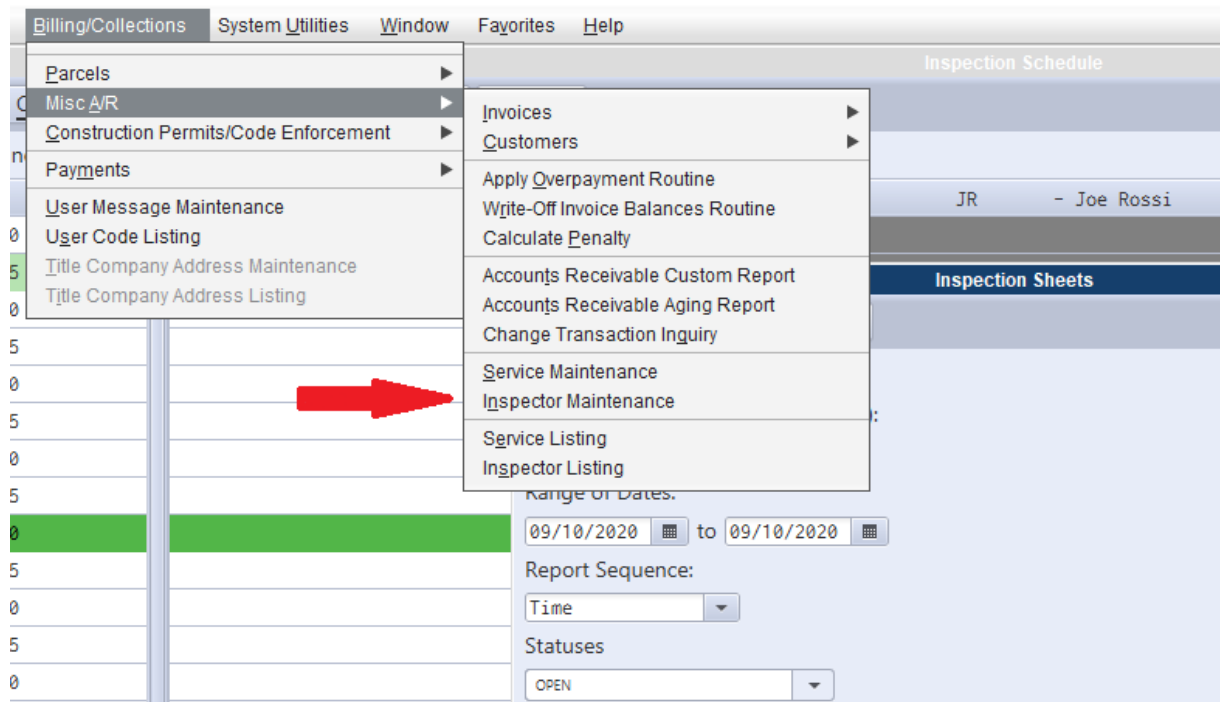
Adding an Inspector

Locate *Billing/Collections* at the top of the screen and left click. Drag the cursor down to *Misc A/R* and left click on *Inspector Maintenance*.

Billing/Collections > Misc A/R > Inspector Maintenance

In the *Inspector Maintenance* window you will first want to hit the green + button at the top left section. Create a two lettered Inspector ID (ie. Joseph Smith – JS) and hit OK. Now you will be able to fill in information such as Name, Title, Phone Number, Email, State License, etc. On the

bottom of this window you can edit which days and what time the inspectors can inspect.



***Note** You can add a signature file. It isn't mandatory to save an inspector but can be used to add signatures at the bottom of *Violations*.

The screenshot shows the 'Inspector Maintenance' form. At the top, there is a toolbar with buttons: Add (with a green plus icon), Edit (with a pencil icon), Delete (with a trash icon), Previous (with a left arrow), Next (with a right arrow), and Help (with a question mark). A red arrow points to the 'Add' button. Below the toolbar, the form contains several input fields and dropdown menus: Inspector Id, Name, Title, Phone (with area and extension fields), Email, Signature File, Point Size, State License #, Exp Date, Default Building Code, Max Inspections Per Day, Default Inspection Activity Type Id, and Default Inspection Length (in min). At the bottom, there is an 'Availability' section with checkboxes for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun) and time slots for Start and End times.

Adding an Inspection

There are two ways to add inspections:

1. Using the *Inspection Schedule*
2. Adding an inspection from the *Construction Permit Maintenance*.

1. Using the Inspection Schedule

Locate *Billing/Collections* at the top of the screen and left click. Drag the cursor down to *Construction Permits/Code Enforcement* and left click on *Inspection Schedule*.

Billing/Collections > Construction Permits/Code Enforcement > Inspection Schedule

Previous	Next	Show All	Help
2020			
DG - Dale Glenn	JF - John Fritts	JR - Joe Rossi	PL
Permit#: 19-00309 6 PEREGRINE DRIVE			
65.02 5.			
		Permit#: 20-00137 45 NEW HAMPTON ROAD	
		82. 19.01	
		Permit#: 20-00137 45 NEW HAMPTON ROAD	
		82. 19.01	
		Permit#: 20-00111 2 BRIDLE LANE	
		48. 74.24	

In *Inspection Schedule* you can click on the date you want to add an inspection. You can use the **Previous** and **Next** buttons on the top to change the month. Double-clicking on a date will open an inspector window with the names of each inspector along the top. The times are listed vertically and inspectors are listed in columns horizontally.

Double-click on a timeslot to open the *schedule inspection* window. From here you can choose Inspector ID, Permit Number, Building Code, Location, and Activity Type. You can also add a comment for phone numbers of the homeowner or additional information. Once you have entered the information needed, press OK to save.

***Note** If you haven't already: right click the blue bar on top of *Inspection Schedule* and right click add to favorites to have this window saved to your *Favorites* tab.

2. Adding an Inspection From the Construction Permit Maintenance

From the *Favorites* tab click on *Construction Permit Maintenance*. In this window you can locate the permit in whichever way you prefer; though the best way to find a permit is by searching with the permit number. Click on the **Inspection** tab to add inspections to this permit.

Favorites > Construction Permit Maintenance > Inspection Tab

First, press **Edit** at the top of the window and then press **Add**. Double-click under **Building Code** and press the **F3** button to bring up a picklist of each subcode. With the subcode selected you can add in the other information by using **F3** to bring up a picklist of information (activity type, inspector, date).

The screenshot shows a 'Schedule Inspection' dialog box with the following fields and values:

- Type: Permit
- Inspector Id: JR
- Date: 06/03/2020
- Start: 10:00
- End: 10:30
- Permit No: (empty)
- Update No: (empty)
- Application Id: (empty)
- Building Code: (empty, highlighted with a red rectangle)
- Location: (empty)
- Owner Name: (empty)
- Block/Lot/Qual: (empty)

An 'Open Maintenance' button is located next to the Application Id field.

In **Description** you can type additional information for the inspection, such as homeowner's name and phone number or specific time of day to inspect. Click **Save** at the top when finished.

Printing Inspection Sheets

An inspection sheet can be printed for your inspectors to refer to, which can be very helpful if they have multiple inspections in one day.

Finding Inspection Sheets

Locate *Billing/Collections* at the top of the screen and left click. Drag the cursor down to *Construction Permits/Code Enforcement* and left click on *Inspection Sheets*.

Billing/Collections > Construction Permits/Code Enforcement > Inspection Sheets

The screenshot shows a window titled "Inspection Sheets" with a menu bar containing "Print", "Close", and "Help". Below the menu bar, the text "Enter the Following:" is displayed. The form includes the following fields:

- Range of Inspector Ids (Blank for All):** Two text input fields separated by a "to" label, each with a dropdown arrow.
- Range of Dates:** Two date input fields separated by a "to" label, each with a calendar icon.
- Report Sequence:** A dropdown menu currently showing "Time".
- Statuses:** A dropdown menu currently showing "OPEN". A red rectangle highlights this dropdown, and a list of status options is shown below it:
 - ☒ OPEN
 - ☐ PASS
 - ☐ FAIL
 - ☐ NOT READY
 - ☐ NO ACCESS

Inspection Sheets Information

In this opened window you will be able to enter the inspector ID and date to get the inspections they have scheduled for a certain day. **Report Sequence** will list the inspections by whichever option you choose: Time or Block/Lot. **Status** will list what kind of inspections will be printed – usually you will only want “open” selected. Click the **Print** button at the top to have the inspection sheet printed.